

# EXECUTIVE SUMMARY

**THE FOLLOWING IS A FEATURE LISTING FOR THE BILL GOOD MARKETING SYSTEM<sup>®</sup>, A COMPUTER-BASED CLIENT MARKETING, PROSPECTING, AND OFFICE MANAGEMENT SYSTEM**

## **ACHIEVING GOALS**

1. Detailed two-year game plan to help you
  - Get better organized and
  - Double production and/or work less
2. Weekly report to let you track progress toward goals
3. Phone consultations with marketing consultants to help you stay on track
4. Software Support—Help when you need it
  - Help in case of general computer-system crash—regardless whose fault it is
  - Automated support using multi-media capabilities of the Web, 24/7
  - Complete local Help file
5. Assistance in designing and testing letters, scripts, and campaigns for use in System
6. When you are contemplating a change in overall strategy, a telephone appointment arrangeable with Bill Good himself

## **CLIENT MARKETING**

1. Proven procedure to retain existing clients and ensure they do not “slip through the cracks”
2. Proven procedure to generate new business from existing clients
3. Pre-written etiquette-type letters easily sent, 50 +
4. Thank-you letters to clients for building good will
5. Birthday letters for building good will, 200 +
  - Married couples will never receive the same letters
  - Birthday letters to send to kids, grandkids and other client associates and family members
6. Procedures to ensure optimum effect when sending client messages
7. Unintentional overlap of mailings prevented
8. Many direct-mail letter models available, 1800 +, in several categories
  - Product
  - Service
  - Concept
  - Values
  - Education
  - Seminar Invitations
9. Call-Me letter campaigns that actually get clients to call in
10. Follow-up scripts for all client-marketing campaigns
11. Comprehensive checklists for all components of client-marketing campaigns—including creating and sending direct-mail letters to make sure the job is done right every time

12. Multiple data-entry wizards that walk you through lead processing, referrals, appointments, new client and prospect groups, etc.
13. Fully customizable Speedbutton Groups<sup>®</sup> for various situations, so you can automatically input notes and actions, send messages, add or delete keywords, etc., with the click of a single button
14. Timely alerts for contact interval dates
15. Plural versions of messages with multiple signatories
16. Ability to assign variable maximum contact intervals in order to contact some clients and prospects more frequently than others
17. Addressing capability allowing you to enter numerous individuals' addresses, phone numbers, fax numbers, emails, and even URL addresses

## **PROSPECTING**

1. Proven strategy to ensure you do the optimum amount of prospecting
2. Two broad prospecting strategies to enable you to prosper in the “Do Not Call” era
3. Low-key tasteful procedure encouraging *unsolicited* referrals
4. Campaign to take your old prospects list, computerize it, weed it down, get rid of the uninterested, and use the remainder as the foundation for building a prospect file of optimum size, producing the desired number of new clients each year
5. Campaigns for people you know and would like to do business with but have been reluctant to prospect—called “no-key” because lower-key than “low-key”
6. Famous proven direct-mail prospecting campaign
7. Choice between Canadian and U.S. versions of campaigns
8. Ready-to-roll seminar campaigns in multiple promotion styles:
  - Mail Only
  - Phone Only
  - Mail/Ad
  - Ad Only
  - Mail/Phone
  - Mail/Mail/Phone (for particularly resistant markets)
9. Comprehensive checklists for all components of campaigns, including creating and sending direct-mail letters, emails, and faxes
10. Comprehensive checklists for special components of seminar campaigns (not appearing in other prospecting campaigns):
  - Pre-seminar materials and facilities checklists
  - Confirmation letter checklists
  - Day of seminar checklist
  - Post-seminar follow-up checklist
11. Follow-up scripts for all prospecting campaigns—including seminar campaigns
12. Advanced Messaging System<sup>™</sup> that enables you to send a message to the desired individual or contact group through their desired channel of communication (email, letter, fax) to the correct location on the desired date

13. Campaign wizard that guides you through the process of starting and carrying out multiple campaigns (e.g., direct mail and seminar)

### **TEAM TRAINING & SUPPORT**

1. Online seminars and multimedia training tutorials to teach all staff about marketing, sales, and service, as well as the computer program
2. Clear job descriptions for Sales Assistant (SA), Service Assistant (SV), Computer Operator (CO), Cold Callers, Expediter, etc.
3. Help in hiring staff in correct sequence
4. Help in interviewing prospective Sales Assistants (by BGM definition—the SA is one who helps the RR *sell*)
5. Recommended compensation for key support staff (SA, SV, CO)
6. Model confidentiality agreements for key staff (SA, SV, CO)
7. Sub-system for service-problem tracking—ensures nothing falls through the cracks and that all service issues are documented meticulously
8. Scheduler—tracks tasks assigned to each staff member in a daily, weekly, monthly, or yearly calendar view
9. Procedures to ensure the staff you are paying for are in fact doing their jobs
10. Multiple checklists to ensure all tasks are performed correctly
11. For RR: Daily and Weekly Planning Checklists, Monthly Marketing Planning Checklist
12. For SA: Daily Planning Checklist
13. For CO: Daily/Weekly/Monthly Task Checklist
14. Sub-systems ensuring various repetitive tasks are always handled according to RR's preferences
15. Systems to track referrals to and from strategic partners
16. Confirmations for in-office, out-of-office, and telephone appointments
17. Seminar confirmations
18. To help you review *your System*, a specially programmed *Database Usage Cheatsheet* produces updated listings of:
  - Letters currently on the System
  - Contents of user-definable fields
  - Various other user definitions
19. Printouts of all client and prospect data readily available

### **WORD-PROCESSING**

1. Database integrated with major word-processor, Microsoft® Word
  - Sophisticated, yet simple to use mail merge capability
  - Interfaced so that user need not be involved in intricacies of mail merging
2. Message elements easily customizable
3. Digitized signature(s)
4. Photos with letter text (as attention-getting devices)
5. Your letterhead scanned into the System, for use in fax coversheets

6. Form letters that can be personalized and customized so they never read like form letters
  - Custom merge fields for unique information, such as appointment confirmation letters
  - Customized questionnaires, coupons, etc., that can be attached to letters for individuals and groups

## COMPUTER STUFF

1. Windows-based program
2. Client and prospect records easily viewed and sorted without interference from mass mail data and vice versa
3. Title Logic™ to ensure that envelopes, inside addresses, and salutations are socially correct
4. Reports allow RR to evaluate effectiveness of various client-marketing and prospecting campaigns
5. Sufficient user-definable fields—14
6. Unlimited user-definable filters, called “selection rules”
7. Database easily searchable by:
  - First and last name
  - Interests and investments
  - Company/organization
  - ZIP/Postal Code
  - Telephone area code
  - Keyword
  - Pre-defined contact group
8. Unlimited list views available
9. Unlimited notes capability
10. Referral and association tracking capabilities
  - Referrals you make to others (e.g. accountants, attorneys)
  - Friends, relatives, and associates
11. Email linking
12. *Fully* compatible import of name and address information from 3 most common other computer database formats
13. **Networkability** with Novell, NT, Windows XP Server, Windows 2000; server required for large teams, peer-to-peer possible for 3 workstations or fewer